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Automated Material Handling Market Forecasts to 2032 – Global Analysis By Component (Hardware, Software, and Services), System Type (Unit Load Material Handling Systems, Bulk Load Material Handling Systems, and Box and Tote Handling Systems), Function, End User, and By Geography

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Abstracts

According to Stratistics MRC, the Global Automated Material Handling Market is accounted for $72.7 billion in 2025 and is expected to reach $148.1 billion by 2032, growing at a CAGR of 10.7% during the forecast period. The automated material handling system encompasses the equipment and technology used to move, store, and manage goods within warehouses, factories, and distribution centers, all while minimizing human intervention. This includes various components such as conveyors, automated storage and retrieval systems, sorters, and warehouse control software. The advantages of implementing such systems involve increased throughput, lower labor and error rates, enhanced space utilization, improved safety measures, and more dependable, data-driven logistics operations that facilitate e-commerce growth and just-in-time manufacturing.

Market Dynamics:

Driver:

Rising labor costs and shortage of skilled warehouse labor

Rising labor costs and a persistent shortage of skilled warehouse workers are primary forces propelling the automated material handling market. Companies are increasingly

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turning to automation to maintain operational continuity and control expenses. By implementing systems like autonomous mobile robots and automated storage and retrieval systems, businesses can reduce direct dependence on manual labor, mitigate the risks associated with workforce volatility, and improve overall productivity. This financial and operational pressure makes automation a strategic imperative for modern logistics.

Restraint:

High initial capital investment and implementation costs

The substantial upfront capital required for automated material handling systems presents a significant barrier to widespread adoption. These costs encompass not only the physical hardware but also complex software integration, facility modifications, and employee training. For many small and medium-sized enterprises, this high initial investment can be prohibitive, lengthening the return on investment period and causing hesitation. Consequently, budget constraints often limit deployment to larger, well-capitalized corporations, potentially slowing overall market growth.

Opportunity:

Adoption of Industry 4.0 and smart warehouse initiatives

The widespread embrace of Industry 4.0 and smart warehouse initiatives opens a substantial growth avenue for the market. These paradigms rely on interconnected technologies, such as the Internet of Things (IoT) and advanced data analytics, which require the foundational layer provided by automated material handling equipment. Furthermore, the demand for real-time inventory visibility and seamless data flow within a connected ecosystem directly drives investments in intelligent automated systems, creating a sustained, long-term demand cycle for modern solutions.

Threat:

Cybersecurity risks in connected automated systems

As material handling systems become more interconnected and reliant on sophisticated software, they face growing vulnerabilities to cyberattacks. Security breaches can lead to severe operational disruptions, sensitive data loss, and significant financial damage. Moreover, a successful attack on automated guided vehicles or warehouse

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management software could halt entire distribution center operations. This risk necessitates ongoing investment in cybersecurity measures, adding complexity and cost for end-users and potentially tempering adoption rates among security-conscious industries.

Covid-19 Impact:

The pandemic acted as a potent catalyst for the automated material handling market. Lockdowns and social distancing mandates disrupted manual labor-dependent supply chains, illustrating the importance of operational resilience. The explosive growth of e-commerce during this period placed unprecedented pressure on fulfillment centers to accelerate order processing while ensuring worker safety. This dual pressure forced a strategic reevaluation, leading many companies to fast-track automation projects to build more robust, flexible, and less people-dependent logistics networks.

The hardware segment is expected to be the largest during the forecast period

The hardware segment is expected to account for the largest market share during the forecast period due to the significant physical infrastructure required to establish any automated system. The substantial capital expenditure associated with this tangible equipment directly translates into its high revenue contribution. Additionally, as the foundational layer of any solution, hardware procurement remains the essential first step in automation, ensuring its continued market leadership.

The box and tote handling systems segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the box and tote handling systems segment is predicted to witness the highest growth rate, driven primarily by the booming e-commerce and retail sectors. These industries need quick, precise, and scalable ways to move standardized, small-item containers around in fulfillment and distribution centers. Moreover, the flexibility of these systems to integrate with sortation and order-picking technologies makes them a critical investment for companies aiming to enhance throughput and efficiency in response to rising consumer demand for rapid delivery.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, fueled by its dominant position in global manufacturing and logistics. Massive

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investments in new warehouse and factory automation across major economies like China, Japan, and South Korea are key contributors. Furthermore, the rapid expansion of e-commerce giants and the ongoing push to modernize supply chain infrastructure across the region create a concentrated and high-volume demand for automated material handling solutions.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. This rapid growth is due to a strong mix of government programs that encourage smart manufacturing, rising labor costs, and a quick adoption of new technologies. The region's dynamic economies are increasingly transitioning from labor-intensive models to automated ones, particularly in emerging markets, which is expected to drive exceptional growth rates for automation suppliers over the coming years.

Key players in the market

Some of the key players in Automated Material Handling Market include Daifuku Co., Ltd., KION GROUP AG, SSI SCHAEFER AG, Toyota Industries Corporation, Honeywell International Inc., Murata Machinery, Ltd., Swisslog Holding AG, BEUMER Group GmbH & Co. KG, Jungheinrich AG, Hyster-Yale Materials Handling, Inc., JBT Corporation, Siemens AG, Bosch Rexroth AG, KNAPP AG, TGW Logistics Group GmbH, Kardex Holding AG, and Mecalux, S.A.

Key Developments:

In August 2025, Daifuku Co., Ltd. completed a new factory building at its Shiga Works (Japan), transferring AGV assembly, conveyor-system manufacturing and parts-center operations a move aimed at boosting productivity, production flexibility and capacity for AGVs and distribution-system manufacturing.

In June 2025, SSI SCHAEFER AG delivered a fully automated warehouse (? 30,000 m?) for Apotea Sweden’s largest online pharmacy featuring a complete intralogistics automation solution from SSI SCHAEFER.

In April 2025, Daifuku Intralogistics India Pvt. Ltd., a Daifuku Group company, launched a new manufacturing plant in Hyderabad to address growing demand for automated material handling systems in India's manufacturing and distribution sectors.

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Components Covered:

- Hardware
- Software
- Services

System Types Covered:

- Unit Load Material Handling Systems
- Bulk Load Material Handling Systems
- Box and Tote Handling Systems

Functions Covered:

- Assembly
- Packaging
- Transportation
- Storage
- Sorting and Distribution
- Order Picking

End Users Covered:

- E-commerce and Retail
- Automotive

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- Food & Beverage
- Pharmaceutical and Healthcare
- Electronics and Semiconductors
- Aerospace and Defense
- Chemical and Energy
- Manufacturing
- Logistics and Warehousing
- Air Cargo and Airport Logistics

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  - Canada
  - Mexico
- Europe
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  - Italy
  - France
  - Spain

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- Rest of Europe

Asia Pacific

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- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

Middle East & Africa

- Saudi Arabia
- UAE
- Qatar
- South Africa

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Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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